Implementing SaaS-Based Sales Force Automation Systems

Subroto Roy [1]
Nirmalya Bandyopadhyay [2]

Abstract

Business-to-business sales force automation (SFA) is changing rapidly, with complex products and services that frequently require team selling and a long sales cycle. With SaaS (Software as a Service), cloud-based systems, data entry, and analytics can be performed from a low-cost back office or by accessible, affordable technology. As a result, salespeople no longer need to work as "lone wolves." Instead, they can become part of "partnering" sales teams as the physical front end of a multichannel, value-creating customer relationship management force. This paper offered a theory-based analytical framework for enhancing SaaS-based digitization in the form of a relational selling and behavioral control matrix.

Keywords : **sales force automation, SaaS-based, on-demand, SFA adoption, relational orientation, behavioral control, outcome control**

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A relationship marketing philosophy in organizations has created a compelling case for the adoption of sales force automation (SFA) and customer relationship management (CRM) systems in organizations (Narasimha Murthy & Vijaya Kumar, 2015; Payne & Frow, 2005; Shruthi & Devaraja, 2011; Speier & Venkatesh, 2002; Sudhakar, 2009). Despite the early promise of SFA, previous literature has reported failure rates as high as 60% in the implementation stage. For example, Speier and Venkatesh (2002) studied salespeople using salesforce automation (SFA) in telecom and real estate. They found that the initial enthusiasm of the sales force for SFA disappeared six months after the adoption stage, absenteeism and turnover increased, and morale decreased. Members of the sales force believed they were becoming dis-intermediated, and sales managers had more power because they knew more about what was happening in each salesperson's area. Costs to add technology were between $5,000 and $15,000 per salesperson (Erffmeyer & Johnson, 2001), and thus, costs have historically been blamed as the primary reason for failure in SFA adoption. This trend continues with Mahlamäki et al. (2020). Theoretically, SFA researchers have repeatedly argued that one primary reason for SFA failure is the reluctance of the sales force to learn the technology, enter sales call data, and analyze the trends. A primary deterrent to sales force adoption of SFA is the distraction from the actual selling that such systems create (Rouziès et al., 2005).

Today, the SFA landscape has changed dramatically with SaaS (Software as a service), also called on-demand SFA. SaaS SFA systems integrate with CRM systems (Payne & Frow, 2005; Zoltners et al., 2021). SaaS cloud-based solutions (e.g., www.salesforce.com) are on cloud servers (e.g., Amazon web services), and users can log in through the Internet and use the software on a variety of per-user, per-month charges from $ 8 to $25 (White &

[1] *Professor of Marketing,* Pompea College of Business, University of New Haven, West Haven, CT, USA. (Email : Dr.SubrotoRoy@gmail.com ; sroy@newhaven.edu) ; ORCID iD : https://orcid.org/0000-0003-4678-1415
[2] *Associate Professor of Marketing,* FORE School of Management, Adhitam Kendra, B 18, NRPC Colony, Block B, Qutab Institutional Area, New Delhi - 110 016. (Email : nirmalya@fsm.ac.in) ; ORCID iD : https://orcid.org/0000-0002-1627-9347

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Bottorff, 2022). Traditional deterrents to SFA adoption disappear with SaaS-based SFA because there is no software to buy or install. Instead, the sales team needs only Internet access from anywhere, including at home, during travel, or at the office. In addition, the sales team can telephonically dictate a report to a low-cost "virtual" assistant who can key in the contact report.

SaaS-based SFA brands include SAP, Seibel, salesforce.com, and pipedrive.com, among others. Stand-alone SFA and contact management systems, such as ACT.com, have also started an Internet-based option. The SFA module can be part of a companywide ERP (enterprise resource planning) system. ERP systems include SAP or Seibel, which is now a part of Oracle/PeopleSoft, which also includes CRM or primarily SFA (which might include CRM, as in salesforce.com).

Apart from significant changes in SFA technology, there has been an increase in the complexity of business-to-business sales and team selling, and partnering with the customer has become important (Mullins & Panagopoulos, 2019). Indeed, the strategic conceptualization of CRM (Payne & Frow, 2005) involves the sales force as the physical front end of a multichannel effort that includes e-commerce, call centers, and physical outlets. There has also been an increase in key account selling and, thus, key account management (Day, 2000; Jones et al., 2005). In other words, a sale might take several weeks or months to materialize, starting from an initial contact or request for a proposal. Presales activities might include several members of the sales as well as technical and delivery teams who might need to respond to different buying center team members and collaborate with members of their own sales team over the sales cycle.

Theory in the adoption of SFA has developed in the backdrop of a technology that was pre-SaaS based and in which the salesperson was a "lone wolf" (Brown, Evans, Mantrala, & Challagalla, 2005, p. 158). The central theoretical lens used in the study of SFA adoption problems was the technology acceptance model (TAM; see Davis et al., 1989; for recent extensions, see, e.g., Jones et al., 2002; Robinson Jr. et al., 2005). The TAM view argued that the adoption rate would rise if the salesperson believed that SFA was easy to use and if she or he could see the benefits of SFA. With the increase in the complexity of products and services that require team-based selling, a TAM-based individual salesperson level of analysis is inadequate. A multimember, frequently geographically dispersed sales team would require a focus on the organizational-level implementation of a distributed SFA. However, SaaS-based SFA is less expensive and more user-friendly than the early computer-based SFA systems. However, evidence suggests (Zoltners et al., 2021) that the SFA adoption problem by the sales force in SaaS-based solutions persists. We argue that two organizational-level implementation variables must align with the availability of SaaS-based SFA to ensure long-term adoption by the sales force.

Objective of the Study

By focusing on organizational-level implementation variables, this research responds to calls in the literature for SFA research in the Internet context (Erffmeyer & Johnson, 2001, p. 174), on the need to expand SFA adoption theory beyond TAM and its enhancements (Robinson Jr et al., 2005), on the integration of sales and marketing through information systems (Rouzièset al., 2005), and on the extension of research on organizational variables in SFA adoption (Pullig et al., 2002). Finally, this research is motivated by the call for broader implementation research on CRM (in which SFA is a subset). According to Payne and Frow (2005, p. 174), "the importance of CRM implementation and people issues is an area where further research is urgently needed."

We present the paper as follows: First, we frame the SFA adoption problem as a two × two matrix, with the diagonal as the firm boundary. Second, on the y-axis, we have a continuum of high transactional/low relational vs. low transactional/high relational selling and present our first proposition. Third, on the x-axis, we have a continuum of high behavioral /low outcome control to low behavioral /high outcome control of the sales force and present our second proposition.

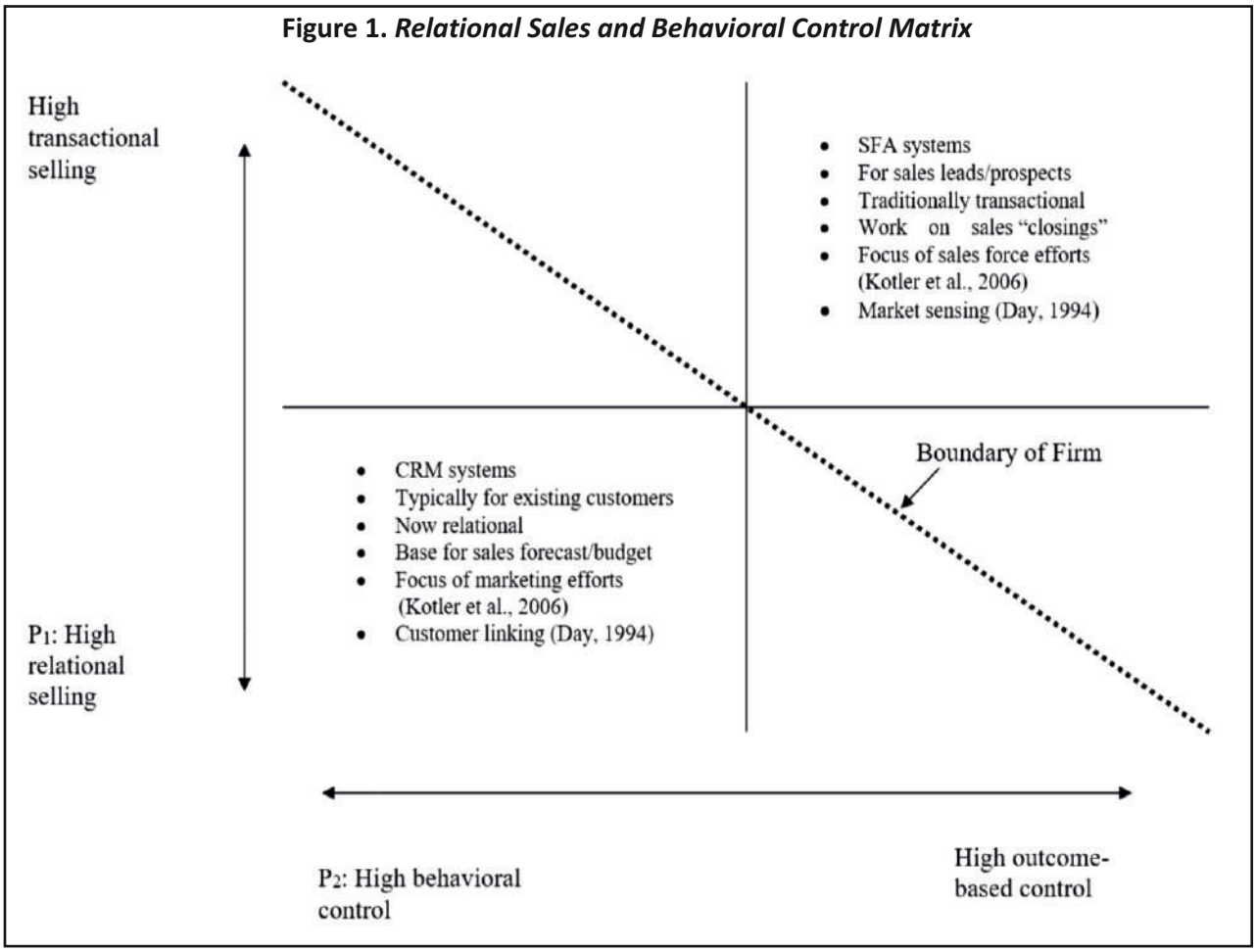
Framing the SFA Adoption Problem in the Relational Orientation and Behavioral Control Matrix

The SFA adoption problem is framed as a matrix (see Figure 1) in the context of two organizational-level variables: relational/transactional sales and behavioral/outcome control. In line with extant research, it suggests that organizations should move toward relational marketing, and sales should move toward relationship selling. However, for relational sales to succeed in organizations through SaaS-based SFA, the sales force's behavioral control (Anderson & Oliver, 1987) must be encouraged.

Relational Quadrant

The firm's ability to maintain and sustain customer relationships is a core competence (Crick & Crick, 2020; Ritter et al., 2002). Satisfied customers provide a steady stream of business and frequently offer new business and referrals. CRM systems try to capture and manage these effects (see the lower-left quadrant of Figure 1). More important, from an information systems perspective, when a customer makes a payment, the accounting and finance system takes over, and every customer becomes a data point for the application of the companywide ERP system. After the customer makes a payment, the company has accounting obligations to keep track of the money

Figure 1. ***Relational Sales and Behavioral Control Matrix***



received. Before the advent of computers, manual vouchers and books ensured this process. This process became one of the first to be computerized on mainframes, personal computers, intranets, and the Internet. Thus, when an existing customer does business with a firm, CRM systems capture his or her interaction as organizational memory (Payne & Frow, 2005).

When an order is received, (a) the production planning system logs it in; (b) the supply chain management system, the production planning system, and the material planning system begin organizing inputs for the next order; (c) quality control systems familiarize themselves with prior issues of quality (if applicable) with the customer; (d) accounts payable is aware of the payment period for the customer; and (e) cash flow systems can predict the cash inflow. Importantly, existing customers, who have ongoing orders and a history of orders, are frequently the basis for sales forecasting and budgeting numbers.

Relationships with existing customers involve "farming" or "upselling" the relationship for more business (DeCarlo & Lam, 2016). It is much easier for the individual salesperson (Miller, 2006) to maintain a relationship with an existing customer than to cold call new prospects. Conceptually, the lower-left quadrant (see Figure 1) of existing customers might be considered more relational customers. Day (1994) calls this the "customer-linking" activity. Customer relationships and, thus, satisfied customers lead to more business as well as happy referrals in the satisfied customer's network. Kotler et al. (2006) call this quadrant the domain of the marketing department because the marketing department operates all its programs according to research and feedback from existing customers.

The lower-left quadrant of Figure 1 is clearly inside the firm's boundaries. It has behavioral controls, including training and awareness of all contact points of the customer's relationship with the firm. Importantly, this quadrant includes essential teamwork that cuts across different functional areas considered customer touch points, including sales, marketing, finance, and production planning. Thus, for example, accounts receivable and production planning personnel are aware of and develop the ability to deal with corresponding contact points at the customer level.

Transactional Quadrant

The prospect/lead management activity, or "customer hunting" (Kiff, 2000), has traditionally been considered a non-core activity of the firm for three reasons (see the upper-right quadrant in Figure 1). First, selling less complex products and services was a solo activity with only one "hunter." Second, the salesperson's role was boundary-spanning; thus, "hunting" happened outside the firm. Here, the management believed that it was appropriate for the salesperson to act independently with no oversight of the particular methods he or she followed in pursuing customers or leads (Froböse, 2015). Third, a prospect who was not yet a customer was merely a sales lead and, thus, a member of the target market with which the firm had no relationship, except for any communications he or she might have received from the marketing and communications efforts of the firm. Because a sales lead can be purchased and a relationship needs specific investments over time, developed relationships (even before the first sale) are considered a "core competency" (see Day, 1994; Ritter et al., 2002). The need to manage a lead in a relational sense is the broader purpose of sales lead management or an SFA system. Such market sensing by the sales force (Day, 1994) is critical in building new customers and is considered the traditional domain of the sales department rather than the marketing department (Kotler et al., 2006).

In summary, the matrix in Figure 1 suggests that though prospects are outside the firm's boundaries, the multimember sales team members are entrepreneurs who earn individual rewards on sales results through outcome- and success-based remuneration plans. Such an approach reduces the motivation of the sales force to input complete data or uses that data for moving the prospect through the sales funnel. A change in the organization's approach to relational selling is more likely to make SaaS-based SFA successful in increasing sales force productivity. These two organizational-level moderating variables are discussed next.

Relational/Transactional Sales and Behavior/Outcome-Based Control

This section argues that certain organizational conditions are essential for SaaS-based SFA to integrate and develop prospects into long-term customers. These organizational-level variables are a relational orientation with prospects or sales leads and high behavior-based controls of the sales force.

Relational Sales as Awareness and Exploration

The new customer acquisition process from the relational lens involves the first two stages of relationship marketing: awareness and exploration (Dwyer et al., 1987). From such a lens, CRM systems may involve later stages of relationship marketing, such as expansion and commitment. From the perspective of the marketing and selling firm, the first two stages of awareness and exploration are outside the firm's boundaries. In contrast, the latter stages are within because the customer has an order-and payment history with the firm. In the former case, boundary-spanning personnel, such as the sales force, develop the relationship, and in the latter two stages, the entire organization becomes involved in serving the customer. Awareness and exploration in the context of SaaS-based SFA systems are considered in more detail subsequently.

According to Dwyer et al. (1987), awareness involves no direct contact of the customer with the sales force. At this stage, the buyer is aware of the selling firm because of marketing campaigns launched previously or simply through word of mouth in the buyer's industry. However, from an SFA perspective, the awareness phase involves listing a sales lead. A sales lead list at this awareness stage involves using predetermined criteria. For example, firms might buy leads from list companies like Dun & Bradstreet and infoUSA.com. Such companies offer an extensive database of firms; depending on the screening criteria, a list of prospects is made available. Alternatively, the customer might contact the company by telephoning a toll-free number or filling out a web form. For example, real estate and life insurance industries have implemented technologies, such as linking a web form to a salesperson's cell phone, that can assist the salesperson in responding to a prospect within minutes of the inquiry (e.g., insuranceweb.com). In addition, digital ads like Google Ads can link with sales force to generate leads so that any marketer using both can pick up leads from the ads directly into the SFA.

At the expansion stage, five sub-processes occur : (a) attraction, (b) communication and bargaining, (c) development and exercise of power, (d) norm development, and (e) expectation development. During the attraction phase, the salesperson might build an identity bond with the buyer (Dwyer et al., 1987). Such an identity bond must be reported in the SFA system even if the salesperson remembers the next time he or she contacts the buyer. The SFA system can serve as a reminder to the salesperson as to the exact nature of the last meeting. For example, suppose the salesperson has created an identity bond with the buyer or purchasing agent, in that case, any information captured could be invaluable in prioritizing the next wave of sales calls made to that buyer. The second sub-process of communication and bargaining involves discussing the buyer's needs, negotiating prices, and delivering and modifying the product or service. By this time, the salesperson has invested as much time in the relationship as the buyer. Both parties negotiate and extend the relationship because there is an expectation of increasing business. Negotiation alone is not an indicator of a future relationship because some negotiations, such as those at estate disposals, can be pretty discrete. The details of communication and bargaining enter into the SFA system. The third sub-process of power and justice is in the context of a developing relationship. The buyer's buying center might want a proposal by a specific date. Such a proposal might involve a multimember team at the selling organization and a partnership approach (Mullins & Panagopoulos, 2019). The selling organization may also need to coordinate a multimember proposal team across several prospective accounts. Again, keeping track of each prospective customer can be accomplished with an effective SaaS-based SFA system. The fourth sub-process of norm development involves understanding how the organizations of the seller and buyer work. For example, the buyer might mention that his or her firm has a policy of responding to supplier emails within 24 hours and

expect the same 24-hour response from the supplier. This information can be crucial to subsequent dealings with the customer if the salesperson or other team members change. The SFA system can retain this "norm" information as the relationship develops. The final sub-process the SFA system can effectively track is expectation development. Dwyer et al. (1987) noted an example of the expectation of the buyer's good credit standing and of communicating this at the salesperson level. Recording such communications in the SFA system can be valuable as transactions commence and the relationship moves beyond the sales force to the entire selling organization. The CRM system takes over at the later stages (i.e., expansion and commitment). Note that the SFA/CRM software suppliers seem to realize this because both Seibel (now Oracle) and salesforce.com project the SFA/CRM systems as an integrated suite of products.

From the preceding discussion, we theorize that organizations that view the early stages of relationship marketing as a central focus of the sales force are more likely than other firms to adopt and use a SaaS-based SFA system. Furthermore, such an organizational orientation encourages organizations to support the field sales force through back-office support in transcribing sales call reports, entering data, and analyzing trends to guide salespeople in planning sales calls for greater effectiveness.

Stated formally:

↳ **P_1 :** The greater the organizational orientation toward relational marketing, the greater the sales force's adoption of the SaaS-based SFA system.

Behavior-Based Controls for SFA Success

Within the sales management literature, the sales force compensation and control question has engaged researchers for a long time. Thus, there is a large amount of literature on the topic (e.g., Anderson & Oliver, 1987); whereas, outcome-based sales force compensation rewards salespeople through commissions on sales dollar volume, behavior-based controls reward salespeople predominantly through salaries and focus on the process rather than actual sales. The argument in support of outcome-based compensation is that sales work is entrepreneurial. Because it takes place outside the firm's boundaries, the salesperson should be allowed to decide his or her course of action. In addition, the uncertainties of the field and the market cause the salesperson to devise strategies that work best in particular situations. An underlying reason for preferring outcome-based sales force control is that finalized sales are easy to measure and commission paid from revenues is easy to implement. However, outcome-based controls have severe problems because the reward is on the results only, and the "ends" sometimes become more important than the "means." Thus, the salesperson may promise things that might be legally untenable (Boedecker et al., 1991) or try to sell only products that are easy to sell and neglect those that are more strategically important for the company. Outcome-based controls tend to treat the salesperson as separate from the company and involve a "laissez-faire" approach (Anderson & Oliver, 1987) to managing the sales force.

In contrast, behavior-based controls involve more information gathering and reporting, predominantly salary-based compensation and emphasis on the process or means of approaching customer acquisition. Under this system, the sales manager is experienced, knows what works, and guides the salesperson. As a result, there is a longer-term orientation, and salespeople tend to be more connected with and informed about the company and its products and services.

Anderson and Oliver (1987) present a theoretical analysis of outcome-based versus behavior-based controls and use four theories to discuss the appropriateness of each for sales force compensation: agency theory, organization theory, transaction cost theory, and cognitive evaluation theory. Given the low-per-user cost and the highly accessible nature of SaaS-based SFA, these four theories are applied to the SaaS-based SFA context. As a result, behavior-based controls are more theoretically compelling and practically viable with SaaS-based SFA systems than outcome-based controls.

Agency theory (Eisenhardt, 1988) suggests that the salesperson is an agent, is "outside" the company, and should be held accountable for the results. Thus, the organization does not need to take the risk of the sales force's success by paying a fixed salary; instead, the salesperson needs to take up the risk and the corresponding rewards on getting sales results. In the pre-SaaS-based SFA era, agency theory suggests that behavior-based controls are too difficult and expensive to maintain because of the information-gathering requirements. With SaaS-based SFA systems, the problem of cost and information on sales force behavior is substantially reduced because the salesperson can key in reports with just an Internet connection from a mobile phone. This way, prior behavior and outcomes can be analyzed to understand what works in particular contexts.

Organization theory (Ouchi, 1979) suggests that if the salesperson is part of a "clan," there is social pressure to follow certain team norms and organizational processes that correspond with the firm's objectives. It assumes no inherent conflict between the salesperson and the organization and believes both can be socialized to work as a team. It also suggests that even if the sales manager has perfect information, such as the call rate of a sales representative, it may not be possible to decide where and on whom the salesperson should call. This theory cannot recommend whether organizations should follow outcome-based or behavior-based controls even if information, outcomes, and behavior are entirely known. However, in the SaaS-based SFA context, a virtual "clan" of the sales force can be developed with back-office data entry and analytics support. In such a clan, all members can log in and see the progress of every prospect. They can also decide which, if any, teamwork tasks are needed.

Transaction cost theory (Williamson, 1985) suggests that outcome-based rewards are transaction cost-effective. According to this theory, salespeople will conduct themselves in a market-friendly manner and engage in behaviors that result in sales. Transaction cost theory recommends behavioral control only when the salesperson brings transaction-specific assets, such as knowledge and relationships, about the product or delivery mechanisms. Traditionally, transaction cost theory posited that acquiring or retrieving information is costly. However, given that SaaS-based SFA applications have a declining cost, transaction cost theory suggests that relationship-specific assets are easy to document and retrieve. Therefore, it is supportive of a behavior-based control system.

Finally, Anderson and Oliver (1987) discuss the application of cognitive evaluation theory to the outcome-based versus behavior-based control question. Cognitive evaluation theory suggests that if rewards and feedback are seen as controlling and extrinsic, the motivation of the sales forces declines. Sales outcomes, particularly adverse ones, can cause many uncontrollable factors. Conversely, behavioral efforts, such as account maintenance and customer service, can provide feedback that is non-threatening and, therefore, potentially intrinsically motivating. Correctly updated SaaS-based SFA systems integrated with CRM have the potential to provide non-threatening feedback that is intrinsically useful for behavior-based controls.

To summarize, behavioral controls viewed through the lens of the four theories (i.e., agency theory, organizational theory, transaction cost theory, and cognitive evaluation theory) suggest that behavioral controls are easy to document and implement with SaaS-based SFA systems.

Stated formally:

↳ **P_2 :** The greater the organizational orientation toward behavior-based controls, the greater the sales force's adoption of SaaS-based SFA systems.

Theoretical Implications

This paper reframes the SFA adoption problem in the light of SaaS-based SFA SaaS applications. These are user-friendly, and back-office staff can remotely support the sales force. However, for such information systems to succeed, organizational variables must be aligned with SaaS-based SFA systems' technological potential. We argued in Proposition 1 that when management promotes a relational orientation of the relationship with new

customers, there will be greater adoption of SaaS-based SFA. Here, we implied that if the management's primary goal for the sales force is to "get" orders (transactional), then the sales force will be unwilling to adopt the SFA. Entering details of relationship-building efforts in the SFA would not count for their job rewards and might have other company salespeople "steal" their prospects. In Proposition 2, we argued that a more behavior-based control (vs. outcome-based control) and reward would encourage the sales force to adopt SFA, consistent with the human resources literature (Mohrman & Lawler, 2017).

This research contributes to five literature streams. First, it contributes to the literature on SFA adoption research in the Internet context. Second, it extends the SFA adoption theory beyond the TAM and its enhancements. Third, it contributes to the integration of sales and marketing through information systems. Fourth, it extends research on organizational variables in SFA adoption. Fifth, it contributes to the SFA/CRM implementation research regarding positioning SFA at the front end of CRM in the new customer acquisition process.

With these contributions, this research addresses the SFA adoption question in the context of the changing nature of marketing in the corporation (Brown, Jones, & Leigh, 2005). In addition, it provides a theoretical rationale to "win the hearts and minds" of the sales force (Desisto, quoted in Beal, 2006) and to facilitate the implementation of SFA/CRM for ease of dealing with issues related to sales personnel (Payne & Frow, 2005).

Managerial Implications

This research attempts to develop a relational selling and behavioral control matrix to advance the argument that customer acquisition should involve the first two stages of awareness and exploration in relationship marketing. The selling organization must reorient itself to a relational paradigm for SaaS-based SFA to develop a prospect or lead into a customer and, thus, a relationship. However, sales forces will buy into the organizational emphasis on relational selling only when sales force compensation systems are more behaviorally based than outcome based. Thus, where there may be a range of compensation (Brown, Evans, Mantrala, & Challagalla, 2005) for a sales team member, the fully supported SaaS-based SFA system will make behavioral compensation systems transparent, legitimate, and fair.

Companies have reorganized their sales forces around key customers rather than product lines (Sharma et al., 2020). This research allows organizations to evaluate which part of the proposed matrix they are in and where they would like to be for various business market customer segments. For example, it may be appropriate to stay with transactional selling if order values are small and there is no customization. On the other hand, high-value complex project sales, long sales cycles, multiple decision-makers, and a large sales team might call for a different approach. For example, this paper suggests more reliance on the behavioral approach to ensure that the SaaS-based SFA is adopted.

Limitations of the Study and Scope for Future Research

This conceptual paper builds on classic papers in marketing that ushered in the relationship marketing vs. transactional marketing era (Dwyer et al., 1987) and sales force control (Anderson & Oliver, 1987). Although we connected that literature to the SFA/CRM adoption problem even when SaaS-based SFA has made the user/adopter experience much easier, but empirical evaluation of the organizational states concerning the SFA adoption has not been done in the current research. Further research should empirically evaluate the range of organizational states concerning the proposed matrix and SaaS-based SFA adoption. This research could create a tool to index an organization's status on the proposed matrix for different product lines, market segments, and associated sales forces.

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Authors' Contribution

Dr. Subroto Roy conceived the idea and developed the study design. He and Dr. Nirmalya Bandyopadhyay extracted research papers with high repute, filtered these based on keywords, and generated concepts and codes relevant to the study. Dr. Subroto Roy and Dr.Nirmalya Bandyopadhyay jointly drafted the paper and checked for appropriateness from the language point of view.

Conflict of Interest

The authors certify that they have no affiliations with or involvement in any organization or entity with any financial interest or non-financial interest in the subject matter or materials discussed in this manuscript.

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About the Authors

Dr. Subroto Roy is a Professor of Marketing at the Pompea College of Business, University of New Haven. He has published in journals such as the *Journal of Academy of Marketing Science, Marketing Science,* etc. He is the Editor of *American Business Review.*

Dr. Nirmalya Bandyopadhyay is an Associate Professor of Marketing at FORE School of Management, New Delhi, India. He has published in journals such as *Journal of Retailing and Consumer Services, Marketing Intelligence and Planning,* etc. He is the Chief Editor of *Abhigyan,* the FORE School of Management journal.